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SIPDIS

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DCHA/OFDA FOR PRATT, AUSTRENG, KHANDAGLE, MENGH
ETTI, BORNS, MARX, HALMRAST-SANCHEZ
AFR/SA FOR FLEURET, LOKEN, COPSON, MACNAIRN
EGAT FOR HOBGOOD, THOMPSON
STATE/AF FOR RAYNOR
PRETORIA FOR, DISKIN, HALE, SINK, REYNOLDS
NAIROBI FOR SMITH, BROWN
LILONGWE FOR RUBEY
LUSAKA FOR GUNTHER, NIELSON
MAPUTO FOR POLAND, BLISS, THOMPSON
MASERU FOR AMB LOFTIS
MBABANE FOR KENNA
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ROME FOR FODAG FOR LAVELLE, DAVIS

E.O. 12958: N/A

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SUBJECT: ZIMBABWE MAIZE PRODUCTION 2004, FEAST OR FAMINE

Summary

1. In recent weeks, the Government of Zimbabwe (GOZ) officially proclaimed maize production of about 2.4 million metric tons (MT) and firmly stated that it will not need food aid. The GOZ withdrew from the FAO/WFP Crop and Food Assessment by ordering its staff back from the field, thus scuttling the joint effort to estimate crop production. Knowledgeable experts have independently estimated maize production, and these estimates range from slightly less than last year's maize harvest of around 800,000 MT to around 1.2 million MT. None approach the GOZ estimate. Notwithstanding the GOZ's alleged bumper harvest, the Grain Marketing Board (GMB) is buying substantial quantities of grain. At this point, it remains unclear if there will be a need for food assistance in Zimbabwe and, if so, whether the GOZ will permit the international community to mount such an effort.

2. The Mission recently held a working session to update its humanitarian strategy and develop contingency plans to address the rapidly changing situation. This humanitarian strategy is being finalized and will be sent to Washington for comment/review. The proposed strategic approach, coordinated with other donors, will be to (1) gather all available information to make the best estimate of humanitarian needs, (2) maintain a field presence of NGOs through highly targeted humanitarian assistance programs to the most vulnerable, allowing for rapid scale up if a humanitarian crisis arises, and (3) closely and carefully monitor and document the situation so that instances of politicization can be publicized and condemned. End Summary.

2003/2004 maize production and food insecurity

3. With the cancellation of the UN Crop and Food Supply Assessment Mission (CFSAM) in early May, there is no definitive estimate of this year's maize harvest in Zimbabwe. The GOZ estimates a bumper crop of around 2.4 million MT. This is significantly at variance with estimates of 0.8 to 1.2 million MT projected by independent analysts. FAO recently reported, based on the CFSAM's visits to three main provinces, their observations along the travel routes and interviews with informants at local level, that this year's total food production (maize plus small grains) would be even lower than last year's 980,000 MTs. (Note: a rough estimate of area planted based on seed sales and use of retained seed is 1.2 to 1.4 million hectares. With an average yield of anywhere from 0.6, the yield level last year, to 0.9 MT per hectare, the production of maize and small grains could therefore be anywhere from 720,000 to 1.14 million MT. End Note.)

4. Zimbabwe's annual requirement for human consumption of maize and small grains is 1.8 million MT. The shortfall, based on estimates of 0.8 - 1.2 million MT production, would be 600,000 to one million MT. Last year the GMB imported 400,000 metric tons. The UNDP reported in February that GOZ officials told them they were being tasked with securing enough foreign exchange to purchase 800,000 metric tons of grain. Available information

suggests that the Government of Zimbabwe may very well have the capability this year to fill the cereal gap from its own resources, or at least a significant part of the gap, should it so choose. Compared to last year, the GOZ is capturing more foreign exchange and presently is 'in the market' buying grain. There are numerous rumors that GMB officials recently went to Australia to buy grain with foreign exchange derived from cotton and tobacco sales. Local and international media have also reported that U.S. companies are purchasing grain for the GOZ secured by tobacco receipts.

15. At this point in time, it is not possible to estimate how many Zimbabweans will be food insecure over the coming year, requiring some level of food assistance. The recently completed ZIMVAC, which is still being analyzed, will hopefully provide an accurate estimate. Comments from ZIMVAC observers point to improvement from last year in certain areas, but note that some households will exhaust their own production sometime between August and September 2004 -- three months after harvest. Economic conditions have made the staple grain, maize, unaffordable for a large number of Zimbabweans. The WFP and FAO are compiling district level data on crop production, food availability and affordability from NGO sources and their own monitors. This exercise will help to identify areas of greatest need, but will not, however, include an estimate of total production.

International food assistance in 2004-2005

16. All major donors and UN agencies anticipate that the participation of international organizations, donors and NGOs in food assistance this coming year will be greatly restricted. The World Food Program (WFP) suspended general food distribution for May and June, on the assumption that there would be enough food to meet immediate post-harvest needs. Beneficiary figures dropped from 4.5 million in April, when general feeding was in operation, to 545,000 in May for targeted distribution only. WFP's regional Emergency Operation (EMOP) that concludes the last day of June is being extended through December. WFP has 65,000 tons of carryover stocks that can cover targeted feeding to the chronically ill (i.e., those likely suffering from AIDS), children and other highly vulnerable groups through that period. WFP's Memorandum of Understanding (MOU) with the GOZ, that covers the operation of NGOs in household food distribution, expires at the end of June. WFP is approaching the GOZ to negotiate a new MOU that will deal specifically with targeted feeding.

17. Options for the international community are limited. The NGOs have developed a substantial infrastructure and field capability to deliver food for general distribution and targeted feeding. Current information on the likely harvest and GOZ imports does not justify the continuation of a large-scale food aid program. Nonetheless, by continuing targeted feeding programs the international community can maintain a presence and be poised to respond rapidly to humanitarian needs if a crisis arises. The GOZ has left the door open for targeted feeding which is continuing under WFP and the USAID-funded C-SAFE (Consortium for Southern African Food Emergency) program. C-SAFE's Market Assistance Program (MAP), that sells subsidized sorghum meal through retail shops in high-density urban areas in Bulawayo, is planning to expand to other poor urban communities. However, it will be difficult to rationalize allocation of additional food donations to these programs with a reported surplus in country. Also, the GOZ would have to grant import and bio-safety permits for donor importation of any additional food, even for targeted feeding programs.

Discussion

18. The Government of Zimbabwe is publicly acknowledging its primary responsibility for feeding of its own population, which is commendable. On the other hand, by restricting international food operations the GOZ will have nearly total control of food distribution. In light of widespread, credible reports of partisan food distribution by the GOZ and its Grain Marketing Board, it will be essential for the international community to try to monitor the situation closely, publicizing and condemning all instances of politicization of food distribution. International oversight will be especially crucial as the country enters its election cycle, with Parliamentary elections still scheduled for March 2005. However, with growing GOZ harassment of NGOs and a reduced presence of WFP, it may become increasingly difficult for the international community to keep on top of developments

in the country's rural areas. It will also be necessary to document the evolving situation carefully, so that responsibility is appropriately assigned for any humanitarian crisis that arises due to inadequate planning.

19. The Mission recently held a working session as a first step in updating its Humanitarian Assistance Strategy. The strategy, which is still being finalized and will be sent to Washington for comment/review, will incorporate contingency plans to address the rapidly changing situation within the country. The proposed strategic approach, coordinated with other donors, will be to (1) gather all available information to make the best estimate of humanitarian needs, (2) maintain a field presence of NGOs through highly targeted humanitarian assistance programs to the most vulnerable, allowing for rapid scale up if necessary, and (3) closely and carefully monitor and document the situation so that instances of politicization can be publicized and condemned. SULLIVAN